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- Check in early! Please log in at least 10 minutes before start time. By logging in early, it allows for troubleshooting of technical difficulties.
WELCOME, ATTENDEES!
2022 IESBGA CONFERENCE

Thank you for all you do to educate and counsel the entrepreneurial sector. We’re proud to be associated with such an impressive roster of business advisors!

After the conference, we hope you’ll remember to include the SBA 504 Loan Program in your arsenal of resources. This program expands capital access for America’s small businesses and fills a market gap in long-term financing. The interest rates with 504 Loans are fixed for the life of the loan, and the terms extend as long as 25 years. That’s why the 504 Loan Program is extremely successful in helping small businesses kick-start growth and advance to the next level in an affordable way!

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**Certification Hours**
Certification hours will be available for each session. There will be a monitor in each session keeping track of who is in the session. To receive credit for attending the session, please remain logged in during the entire session.

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Ad Hoc:
**WEDNESDAY, May 18, 2022**

11:00 AM-12:00 N  Professional Development Committee  
Certification Committee  
Membership Committee

**Join Zoom Meeting: ID #86081304000**

**Password:**  SnhxajZnY2ICZG8vQXpUc2pMSndMUT09

12:00-12:45 PM  Check-in / Networking

12:45 PM–2:00 PM  General Session I

Welcome, New Member Orientation and Annual Meeting of IESBGA  
Keli Krueger-Huhra, IESBGA President

**Join this Zoom meeting ID #86212404601**

**Password:**  YVFhbHFEcGFpVHFXSzBIMnU0eEdXdz09

2:00 PM-2:15 PM  Networking Break

2:15 PM–3:45 PM  Session I Workshops

1)  **Access to Capital**  
Mary Tritsis, Senior Director of Community Lending, Allies for Community Business

**Join Zoom Meeting: ID #82260784054**

Allies for Community Business (A4CB) provides the capital, coaching, and connections entrepreneurs need to grow great businesses that create jobs and wealth in their communities. A4CB offers loans between $500 and $100,000 to early, emerging, and established businesses at fair prices. In addition, we provide free coaching to anyone who wants to start or grow a business, and we connect entrepreneurs to trusted partners that can help further. Join A4CB’s Sr. Director of Community Lending, Mary Tritsis for an overview of our services and hear about how we partner with SBDCs across Illinois.

**Mary Tritsis** joined A4CB in 2019 and brings 30 years of banking experience to her role. Prior to A4CB, she was responsible for overseeing the Retail Banking Division for two different Chicago-based banks, First American Bank and BankFinancial. Mary also has over 10 years of non-profit experience and she
currently serves as President of KIDSS for Kids, one of the largest affiliated organizations at the Ann &
Robert H. Lurie Children’s Hospital of Chicago where she is a Board Member of the foundation. She
earned a Bachelor's of Business degree from Loyola University of Chicago and a postgraduate in
Executive Management from the University of Michigan's Stephen M. Ross School of Business.

2) Overview of SBDC Net: Your Partner for Client Success
Matthew Jackson, Director, SBDC National Information Clearinghouse (SBDCNet)

Join Zoom Meeting: ID #82389731388

Learn all about the SBDC National Information Clearinghouse (SBDCNet), the official nationwide
research service and support program for SBDCs. As your partner for client success, the SBDCNet works
one-on-one with you to provide in-depth, customized market research and other business
development resources to support you and your SBDC clients' information and resource needs.
Attendees will learn about the variety of SBDCNet's research services and capabilities, how to gain
access to valuable business research and tools, best practices, SBDCNet trainings and more! Visit your
partner for client success at www.sbdcnet.org

Matthew Jackson is the Director of the SBDCNet, the official national information clearinghouse of the
U.S. Small Business Administration. Its mission is to support the business research and information
needs of the nation's network of Small Business Development Centers (SBDCs) and their small business
clients. The SBDCNet provides small business research services, producing a broad range of industry,
financial and demographic reports customized to each small businesses' market and geography.
Matthew has a diverse professional background, having owned several small businesses, in addition to

3) OFAC 101 and Overview of Sanctions
Tami Dixon, Enforcement Officer, Office of Foreign Assets Control (OFAC) Enforcement Division

Join Zoom Meeting: ID #89734184172

Overview of OFAC sanctions programs.

Tami Dixon is an Enforcement Officer at the Office of Foreign Assets Control. She holds an MBA from
Whitworth University and an MPA from the Monterey Institute of International Studies.

4) Building Relationships in Government Contracting
Cheryl Berkemann, PTAC Advisor, Illinois PTAC at Western Illinois University and
Theresa Ebeler, Center Director, Illinois PTAC at Western Illinois University

Join Zoom Meeting: ID #83968206934

In this session, participants will learn about the basics of building relationships with government
agencies. The information in this session is designed to assist PTAC advisors and their clients in building
(and sustaining) new relationships with agencies and prime contractors. The 90-minute session will be
in two parts; part 1: building relationships with agencies and part 2: building relationships with prime contractors.
Cheryl Berkmann retired in 2017 with 35 years of experience in government acquisition & Policy. She is well versed in every facet of government contracting, including small business subcontracting plans, acquisition strategy, FAR/policy, and debriefings. She has worked with USACE Memphis District, NGA, USTRANSCOM, & Scott Air Force Base.

Dr. Theresa Ebeler has been serving businesses through the Illinois Small Business Network since 2001. During this time, she served as the SIUE SBDC Director and WIU PTAC Director. In 2021 Dr. Ebeler received her Ph.D from St. Louis University. Her research studies the relationship dynamic between academy, agency, and industry in urban redevelopment.

3:45 PM-4:00 PM Networking Break

4:00 PM-5:30 PM Session II Workshops

1) Intellectual Property Basics and Helpful Resources
   Crystal Hammond, Primary Patent Examiner, United States Patent and Trademark Office

   Join Zoom Meeting: ID #87231476859

   Unfamiliar with patents, trademarks, copyrights, and trade secrets? Do not miss this opportunity to learn from United States Patent and Trademark Office (USPTO) experts about intellectual property (IP) basics and potential ways to protect your innovation as you transition from idea to product.

   The discussion will cover:
   1. An overview of intellectual property types: patents, trademarks, copyrights, and trade secrets
   2. Why innovators and entrepreneurs should consider protecting their IP
   3. Local resources and assistance available through the USPTO and other agencies

   Crystal Hammond is a Primary Patent Examiner who joined the United States Patent and Trademark Office (USPTO) in 2006. Crystal is currently serving as a Special Outreach Assistant to the Midwest Regional Executive Team for the Elijah J. McCoy Midwest Regional United States Patent and Trademark Office (USPTO) located in Detroit, Michigan. Crystal is responsible for stakeholder engagement and outreach initiatives in the nine states that comprise the Midwest Region: Illinois, Indiana, Iowa, Kentucky, Michigan, Minnesota, Missouri, Ohio, and Wisconsin. Crystal received her Bachelor of Science in Electrical and Computer Engineering from THE Ohio State University in 2003. In her 15 years of service she has examined patent applications relating to digital logic, pulse measurement, and details and arrangements associated with antennas and for operating Light Emitting Diodes. Crystal is also a small business owner.

2) Basic Neoserra Entries/Usage
   Jenny Malloy, Data Integrity Manager, Illinois Small Business Development Center and Ericka White, Assistant State Director, Illinois Small Business Development Center

   Join Zoom Meeting: ID #84319892714

   This presentation will cover basic usage of the Illinois SBDC Network authorized CRM, Neoserra. In addition to basic navigation of the platform, we will explore account preference settings, key features
as well as cover the required content necessary for entries that capture your day-to-day activities. Throughout the session, we will discuss best practices and other helpful tips as you build your knowledge of the platform. After all, if it isn't in Neoserra accurately, IT DOESN'T EXIST.

**Jenny Malloy** has worked in business for 19 years. Currently, Jenny is working in the Illinois SBDC Network State Office as the Data Integrity Manager. With a background in customer service, project management, and data analysis, she places emphasis on accurate data as well as the customer experience. Her passion for helping others is what drives her work ethic.

**Ericka White** is the Assistant State Director for the Illinois SBDC Network hosted by the Illinois Department of Commerce and Economic Opportunity. At DCEO since 2000, Ericka has held various positions within the agency in fiscal operations, legislative grants and most recently served as the program manager for three statewide tax credit programs and managed the First Stop Business Information Center, a single statewide resource for entrepreneurs and businesses to obtain comprehensive regulatory and permitting information. In her current role, Ericka oversees the day-to-day operations of 39 center locations throughout the state. Born and raised in Springfield, Ericka is a three-time graduate of the University of Illinois earning both a B.S. and Master in Business Administration as well as a Masters in Legal Studies. She actively volunteers for several local organizations and has held previous positions on local task forces focused on community engagement and economic development.

3) **Global Supply Chain Crisis—An Industry In Chaos**

Paul Jarzombek, President and CEO, LR International Inc.

**Join Zoom Meeting: ID #88492637833**

Combine a lack of spending on infrastructure in the U.S. and globally with record demand, weave in labor shortages due to COVID and a war in eastern Europe and you find yourself where the global supply chain is today. What strategies can you institute that may help you beat the delays and inconsistencies plaguing the market today? Join us as we offer some tips and strategies as well as a dose of reality as to the current situation and a look ahead.

Paul Jarzombek is the President and CEO of LR International Inc., a global freight forwarder and logistics provider. Paul’s career spans 32 years in the international business and logistics industry. Widely regarded as one of the leading authorities on global logistics, supply chain and compliance, Paul has lectured for dozens of organizations and Universities on international business topics. Paul is a member of the Illinois District export council and recipient of the Certified Global Business Professional designation. LRI is a two time winner of the President’s E-Award and the State of Illinois Export Award.

4) **Illinois Procurement Bulletin for Public Institutions of Higher Education**

Kayci Puckett, Director, IPHEC, University of Illinois and
Jodi Wright, Bulletin Manager, University of Illinois

**Join Zoom Meeting: ID #81775699597**

Brief overview of the Procurement Bulletin to include; search, registration, e-bidding, and basic overview.
Kayci has worked in Procurement with the University of Illinois for 13 years. Working with Illinois Public Higher Education Cooperative (IPHEC) for the last 7 years.

Jodi has been the Bulletin Manager for 13 years working with the various Public Institutions and the Chief Procurement Office for Higher Education.

Thursday, May 19, 2022

8:00-9:00 AM  Check-in / Networking

8:00-9:00 AM  Coordinating Council Meeting  Join Zoom Meeting: ID #96550422859

9:00-10:30 AM  Session III Workshops:

1)  How Tech Will Shape Small Business Support and Access to Resources
   David Ponraj, CEO, Economic Impact Catalyst

   Join Zoom Meeting: ID #81652045116

   The future will demand better, more practical ways of equipping entrepreneurs with the right tools and providing equitable access to resources. Learn about scalable solutions being adopted statewide in Michigan, Colorado, and Georgia to bridge resource gaps for diverse entrepreneurs in all types of communities. Explore how small business development organizations are preparing to capitalize on transformative technology to strengthen entrepreneurial ecosystems, overcome operational challenges, build greater capacity for services and track the impact.

   David Ponraj is the founder and CEO of Economic Impact Catalyst (EIC), a technology and market research company, building solutions to drive inclusive entrepreneurship-led economic development. At EIC, David has worked with economic developers in more than 100 markets to implement community platforms and technology-enabled tools to simplify small business support, strengthen community, measure impact, drive policy, and increase small business success. Prior to founding EIC, David held vice president titles with cross-functional teams at Nielsen, a leading global data and market research firm. A minority business owner himself, David speaks frequently at national conferences and events on the topics of entrepreneurship, engagement of minority-owned small businesses, and inclusive ecosystem building. He holds an MBA from the University of South Florida.

2)  Get Your Local Business on Google Search and Maps Train-the-Trainer Session
   Randi Penfil, Google-Supported Trainer, Google

   Join Zoom Meeting: ID #86763753521

   Showing up when customers are searching online is more important than ever. Ensure customers can find accurate, updated information about your local business on Google Search and Google Maps, no matter which device they use. In this workshop, you will learn how to create and manage a Google Business Profile from start to finish. In this session we will show you how to:
• Create or claim your Google Business Profile
• Manage your business info across Google Search and Maps
• Use your Business Profile to connect with potential customers

Randi is a speaker for the Grow with Google Program. She has more than 20 years of experience helping small businesses and non-profits improve their digital marketing. Before becoming a Google Supported Trainer, she educated and trained SMBs for Constant Contact as the Mid Atlantic Regional Development Director.

3) Advising Clients on Entering Southeast Asia: identifying challenges, opportunities and creating long-term success in Southeast Asia
   John Dwyer, Managing Director, Peregrine Management International LLC and
   Jim Ryan, International Trade Specialist, Illinois SBDC ITC at Bradley University

   Join Zoom Meeting: ID #81792996552

The U.S. Administration is currently signaling a pivot to Asia to increase cooperation and trade, particularly in Southeast Asia. Moreover, countries, companies and even consumers are looking for alternatives to China, due to supply chain issues and ongoing trade disputes, making the region even more crucial to Illinois businesses’ international success. This session will examine the distinct cultures, business and regulatory environments of Southeast Asia to enable advisers to help their clients find success in these highly competitive markets offering enormous potential for Illinois companies. From there, our speakers will drill down to examine current trends to identify specific opportunities in industry sectors and countries, as they introduce strategies for a regional approach. Through our counseling, we have been aware of Southeast Asia’s (SEA) growing importance in terms of global trade, and its increasing desirability as a target for our companies’ products and services for a number of years. At the same time, we have also observed some consistent challenges that inhibited companies’ efforts to explore opportunities, such as unfamiliarity with the languages and cultures, which is often perceived as a more significant barrier for companies than similar challenges presented by Mexico or Germany, for example. Moreover, legal and regulatory regimes, supply chain demands and limitations, and how companies identify products and make buying decisions, as well as the at times lengthy necessity for relationship-building before contracts are finalized, are all seen as significant barriers. As a result, even as companies have expressed a desire to explore opportunities in the region, we have observed them pass on sales, as they prioritized existing customers in countries that are more familiar to U.S. businesses. However, a succession of global disruptions seems to be moving SEA from an aspirational goal to a priority. Due to trade conflicts, companies around the globe are looking to mitigate risk that arises from over relying on China, as a customer and a supplier. Trade data makes it clear that SEA has been the big winner in this shifting of priorities. Moreover, as existing customers disappeared during the pandemic, companies were faced with the reality that they may have ignored the growing markets of SEA for too long, as they scrambled to identify new customers. We have also heard from clients that the changing trade landscape is creating opportunities to challenge entrenched competitors in markets where they may have been slow to enter before COVID.

John is the founder and managing director of Peregrine Management International, a management advisory firm located in Hanoi. Peregrine provides Vietnam market entry advice, as well as advisory and training services.
relating to supply chain and manufacturing operations. John is an active member in AmCham, where he founded and chairs AmCham Hanoi’s Supply Chain & Manufacturing Committee. Prior to founding Peregrine Management International, John worked at Polaris Inc., an American global specialty vehicle manufacturer. John moved to Vietnam to establish Polaris’s subsidiary factory in Vinh Phuc province, where he then served as General Director. During his time at Polaris, John held several management roles in strategic sourcing, new product introduction, and project management. Before joining Polaris, John spent ten years at Caterpillar, Inc., in a variety strategic sourcing and Six Sigma roles. John holds a Bachelor of Science degree in International Business (Asian Studies Minor) from Bradley University and a Master of Business Administration from the Carlson School of Management at the University of Minnesota. In addition to Vietnam, John has previously lived in Tokyo, Japan, and Shanghai, China. John lives in Hanoi with his wife Haruko and three young children.

Jim Ryan has been an International Trade Specialist at Bradley’s Illinois SBDC International Trade Center since 2008. He has UK and US law degrees and a diploma from the Institute on International and Comparative Law at Oxford University, England. He lived in Southeast Asia for over a decade where he taught at colleges in Singapore and Malaysia and worked for San Jose-based technology firms in contract management and international business development across the Pacific Rim. While working at a law firm in Malaysia, he launched an import/export venture that he expanded to include retail in Kuala Lumpur and Miami. At the ITC, Jim enjoys focusing on Asian trade issues, including involvement in study abroad to Asia, as the coordinator for the Foster College of Business Global Scholars Program; co-leading a trade mission to Indonesia with the US Commercial Service; heading the university’s international student recruitment efforts in Indonesia and Vietnam; and he is currently the program director for the SEA Change project funded by a US Department of Education BIE grant to increase US exports to Southeast Asia.

4) HZ Early Engagement Initiative (HZ EEI)
Takeisha ‘Kei’ Hodge, Program Manager of Certification and Outreach, and
Angela ‘Angie’ Wells, Business Opportunity Specialist (BOS), SBA/HUBZone Program

Join Zoom Meeting: ID #86121329101

Train the trainer. The HZ staff will train resource partners to assist procurement-ready firms with their HZ electronic applications and provide assistance with confirming and submitting the HZ office with a complete application package.

Takeisha Hodge is the Program Manager of Certification and Outreach with the HUBZone Program. For over 16 years in HUBZone, Takeisha has demonstrated strong leadership qualities to foster high collaboration and productivity levels by effectively communicating with her team, providing extensive training, motivating, and building healthy relationships with colleagues and stakeholders. Takeisha manages the HUBZone Early Applicant Engagement Initiative. She works closely with the federal government, PTACs, SBDCs, and Procurement Center Representatives (PCRs) to get ‘procurement ready' firms certified as HUBZone Small Business Concerns (SBCs). With an extensively strong knowledge of the program, Takeisha provides hands-on training relating to the initiative’s mission, the application process, and eligibility criteria to the participating resource partners. Takeisha can be reached at takeisha.hodge@sba.gov or (202)255-7022.
Angie Wells is a Business Opportunity Specialist with 30+ years of experience with the U.S. Small Business Administration (SBA). She is a program analyst for the Historically Underutilized Business Zone (HUBZone) program office and reviews applications for initial HUBZone certification. She joined the HUBZone team in November 2019. She previously served as an Economic Development Specialist at the St. Louis District Office, which serves the eastern half of Missouri. In this capacity she worked with many entrepreneurs and resource partners, providing counseling and training on SBA programs and services. She also served as the women’s and veterans’ representative and was the program manager for the Emerging Leaders initiative. Angie can be reached at angela.wells@sba.gov or 314-539-6613.

10:30-10:45 AM  Networking Break

10:45 AM-12:15 PM  Session IV Workshops:

1. Introduction to SBA Programs
   Charles White, Lender Relations Specialist, Small Business Administration and
   Robert Esquivel, Supervisory Lender relations Specialist, U.S. Small Business Administration

   **Join Zoom Meeting: ID #82682237402**

   Covers the SBA programs currently available for lenders to utilize. The 7(a) program is very useful to cover up collateral shortfalls, allowing longer amortizations, and for businesses that lenders traditional stray from (start-ups).

   Charlie has been in SBA lending since 1999. His various acumen include working for two SBA CDC, administering three different lender’s PLP authority, and for the last three and a half years he’s working for the SBA itself.

   Robert Esquivel, has been with the SBA since 1988. He is responsible for the Lender Relations Section which includes screening, interviewing, counseling, marketing, and assisting Lenders with processing applications for financial assistance from small businesses under the various financing programs in the Illinois District Office. Mr. Esquivel directs and coordinates Lender Relations Specialist in evaluating Lender services and promoting the District financing programs, including 7(a) general business loans, 504 loans, Export revolving lines of credit and all other loan programs implemented by the Agency. Prior to working for the SBA, he was a Vice President of local community bank in Chicago, where he had worked for fourteen (14) years. Mr. Esquivel has attended and successfully completed the Graduate School of Banking at University of Wisconsin and the Illinois Banking School at Southern Illinois University.

2) What Every Entrepreneur (and their Advisors) Should Know About Personal Credit
   Rick Lowitz, Co-CEO, Working Credit NFP and
   Kristin Schell, Chief Program Officer, Working Credit NFP

   **Join Zoom Meeting: ID #88692547858**

   Strong personal credit is fundamental to an entrepreneur's ability to start and grow a business. It is a precondition for a first business loan, a credit card for managing business expenses, a lease for
business space, or a mortgage for business property. Working Credit proposes to conduct our organization’s signature credit building workshop for the IESBGA Conference. Our 45-minute curriculum was designed to give participants a comprehensive picture of the system that governs the collection and dissemination of personal credit information, and the generation of personal FICO credit scores. Working Credit’s workshop starts with basic information – the players in the credit system, the scoring model used by most lenders (FICO®), and the score values (or tiers of scores) and what they mean to lenders. In building a basic picture of the system, the workshop covers two key topic areas: 1) the impact of credit on individual and household financial health, and 2) the landscape of predatory actors in the credit space, like credit repair and debt settlement companies, that strip people of income and assets. The workshop then turns to the nuts and bolts of credit building, which our group has boiled down into three fundamental rules. These are lessons which few financial education programs teach, but all U.S. adults should know. In short:

1. To establish a credit score, you need at least one credit card or one loan, as these are the products that reliably report monthly payment information to the credit bureaus.
2. To build a strong score, you have to manage these products (loans and credit cards) well – making all your payments on time, or at least within 30 days of the due date. Payments that are 30 or more days late are considered “delinquent,” and can lower your credit score by 100-125 points.
3. If using a credit card to build credit, you have to keep the balance – on every card – below 30% (or lower if possible) of the credit limit. Higher balances can lower your credit score by 40-50 points.

At the end of the workshop, individuals who want or need more assistance can sign up for FREE one-on-one credit building assistance. This service begins with an in-depth first appointment (which generates a detailed credit action plan), after which participants can access unlimited support from the same counselor for 12 months. Working Credit’s curriculum is most easily and effectively taught via Zoom, as that platform gives participants two valuable resources: (1) a way to anonymously ask questions – and get answers – during the workshop (an instructor facilitates the session, while a counselor answers questions in real time through the Q&A function), and (2) privacy for individual business owners who decide, at the end of the workshop, to sign up for one-one-one assistance (workshop participants can click on a link posted in the chat box to schedule their first appointment).

Since our launch in 2014, Working Credit has conducted this workshop for over 5000 adults. For many years, the program was offered almost exclusively as an employee benefit – we partnered with employers to bring credit building to their workers. In 2020, however, we intentionally expanded our reach – building relationship with nonprofits to get credit building services to populations pursuing goals for which strong credit is required. Small business owners of color were among the first groups served through the expansion. Working in partnership with eight Chicago-based business support organizations (BSOs), we began to teach cohorts of small business owners participating in group-based business training. Through these relationships, we’ve served over 300 small business owners, often working in parallel with the BSOs – Working Credit assists the business owner with personal credit, while the BSO assists with business development and growth. And the results have been strong. While 76% of business owner improved their credit scores in 6 months, the data show a six percentage-point increase in the number with prime FICO® scores (from 37% to 43%), and a seven percentage-point increase in the number with a safety net of at least $1,000 in available credit (from 51% to 58%). If helpful, we welcome IESBGA conference organizers to preview the workshop. We would be happy to run a session specifically for that purpose, or to welcome conference organizers to join workshops held for other partners. Reaching small business owners is an important part of Working Credit’s strategic plan, and we are grateful for this chance to present our work.
Ricki Lowitz is co-Founder and co-CEO of Working Credit NFP, a national non-profit that partners with individuals and communities to interrupt structural racism by providing credit building education, counseling, and the products people need to thrive financially. Prior to launching Working Credit, Lowitz served as the Director of Economic Opportunities for LISC Chicago. There, she created the organization’s first network of Financial Opportunity Centers – a model LISC replicated in over 20 U.S. cities, and for which LISC received a federal Social Innovation Fund award in 2010. Lowitz also developed Twin Accounts, a credit building and savings product featured in The New York Times Magazine and Telemundo Nacional in 2014. Before joining LISC, Lowitz developed employment initiatives for the Comprehensive Community Revitalization Program (CCRP) in the South Bronx. Lowitz also worked for Business and Professional People for the Public Interest (BPI) in Chicago, assisting residents from the Henry Horner public housing development pursue community revitalization goals. Ms. Lowitz holds a Masters in Public Policy from Columbia University in New York.

Kristin Schell is Chief Program Officer at Working Credit, and brings over a decade of experience helping individuals, families, and organizations to understand credit building as asset building. Before joining Working Credit, Kristin was Credit Building Manager at Justine PETERSEN, a CDFI and microlender in St. Louis. There, she ran a national secured credit card and small dollar loan program. Kristin was the lead credit building trainer for the “Asset Building through Credit” Pilot Program—a FIELD project through the Aspen Institute, as well as the Chicago Credit Building Coalition and the Local Initiatives Support Corporation’s network of Financial Opportunity Centers—during which she trained more than 100 non-profit organizations. Kristin was also part of the inaugural class of Emerging Leaders in Microenterprise (ELM2), an Aspen Institute FIELD program in 2013 and spent six years as a board member of Credit Builders Alliance in Washington, D.C. Kristin has her Master of Social Work from Saint Louis University and an undergraduate degree from the University of Kansas.

3) Doing Business with Multi-lateral Development Banks (MDBs)
Janelle Santerre Weyek, Senior Commercial Officer and Commercial Representative to the EBRD, International Trade Administration, U.S. Department of Commerce and Andrey Piroozgar, International Trade Specialist and Global Technology Deputy Team Leader, International Trade Administration, U.S. Department of Commerce

Join Zoom Meeting: ID #81237722097

The U.S. Department of Commerce’s (USDOC) International Trade Administration (ITA) has a Foreign Commercial Service Officer stationed at five different Multilateral Development Banks (MDBs): the African Development Bank; the Asian Development Bank; the European Bank for Reconstruction and Development; the Inter-American Development Bank; and the World Bank. The MDB program resides in the USDOC’s Advocacy Center and is led by the Senior Commercial Officer at the World Bank. Each MDB differs from the other in its geographic coverage, emphasis on public vs private projects, and overall development goals. These MDBs lend billions of dollars in developing countries for projects aimed at accelerating economic growth and social development by reducing poverty and inequality, improving health and education, advancing infrastructure development, and encouraging privatization, good governance and rule of law. When an MDB finances a project, all responsibility for its implementation, and for the award and administration of related contracts, rests with the borrower with oversight and support from the MDB. Doing business with any of the MDBs depends on a company’s ability to do business in the country where the project will be implemented, and with the borrowing government that runs the procurement process. Knowledge of the local language, culture,
business practices, legal system, and other local conditions is essential. Firms with a local presence, whether through a partner or representative, or their own branch office or subsidiary, will be able to position themselves more effectively to compete than firms operating remotely or with no local experience. MDB project life cycles tend to be long, often beginning years before the first procurement notice is ever issued. Firms that begin focusing on a project at the issuance of a procurement notice may find themselves at a competitive disadvantage. It is essential that firms pro-actively engage with bank and host-country officials during the development and design of projects, and not wait until projects are approved by the MDB boards. Many US firms are not able to take on the risk profile of being the prime contractor in some of the world’s most challenging and poor countries, and instead opt to supply goods and services as a sub-contractor to foreign prime contractors.

**Janelle** helps U.S. exporters do business around the world, via the U.S. Commercial Service network of over 105 domestic offices and posts in over 75 countries around the world. Previously located in Sub-Saharan Africa, she currently serves in the U.S. Mission to the European Union, focusing on commercial diplomacy and trade policy. Prior to the Commercial Service, she brings over 20 years of global market and channel experience from Fortune 500 firms to niche industry players. Broad-based market experience, a solid foundation in finance, and a strong business acumen honed through business model development and reinvention strategies created Janelle’s sweet spot in driving revenue growth and profitability. Janelle brings a proven track record in commercial diplomacy and trade promotion, private industry, and extensive experience teaching global market entry strategy. Janelle’s functional expertise is in international and domestic market entry and expansion strategy and execution, product development, and segmentation. Janelle holds an MBA and a Masters of International Management from the University of St. Thomas, and a BA in International Relations from the University of Minnesota; she was an adjunct instructor in the MBA program at the University of St. Thomas, St. Paul MN. Janelle studied in France, and has lived in Turkey, and speaks and writes both languages.

**Andrey Piroozgar** is currently the Global Technology Deputy Team Leader and International Trade Specialist at the U.S. Department of Commerce’s International Trade Administration. Prior to joining the U.S. Department of Commerce, Andrey worked for a technology company and headed their International Business Development department. He frequently relied on various International Trade Specialists for guidance and assistance during his time in the private sector. Andrey graduated from Florida Atlantic University with a Master’s degree in Political Science, specializing in International Political Economy. Andrey currently resides in Chicago, Illinois and supports U.S. businesses in Illinois, along with his responsibilities as the Global Technology Deputy Team Leader.

4) **PTAC Roundtable**
   Moderator, Darryl Thomas

   Join Zoom Meeting: ID #84644412101

Darryl will facilitate a round table discussion for PTAC members with the topic “Best Practices Using PTAC Resources”. This is an opportunity for all PTAC staff to network, exchange ideas, discuss resources and share best practices on the important issues that are currently affecting the Illinois PTAC Program. Come prepared with questions for the PTAC Program Manager and other PTAC directors. Take advantage of the chance to learn, teach and vent. An agenda will be provided at the start of the session.
~12:45-1:45 PM  GENERAL SESSION II: Bret Behrens, WCIA 3 Sports Director and Susan Burton, Artist

Join Zoom Meeting: ID #83025924870
Password: cHEvYIE2NDNWait6eUxYR3BiUHpuQT09

Bret is a Central Illinois native, graduating from Mahomet-Seymour High School in 2005. He went to Parkland College and later earned his degree in Radio-Television from Southern Illinois University Carbondale. He has been working at WCIA since 2013 as a Sports Director, and was named weekend sports anchor in 2015. A near death accident in 2006 nearly cost Bret his life. After spending 13 days in a coma and 56 nights in the hospital, he started a new life with an amputated leg, but it’s not slowing him down. Bret is making the most of his opportunity to raise a family and do the job he loves, all while thanking God every step of the way.

Marseilles, IL artist Susan Burton holds BA from Southern Illinois University Carbondale in Interior Design with a double minor in Art and Architecture. She is a member of the Society of American Mosaic Artists, and her work can be found in public spaces, parks, schools, and commercial and residential settings. Mrs. Burton’s work bridges art and community development. She specializes in developing large scale community-ready sculpture and mosaic projects. Susan trains all ages to participate. Burton feels that her public art projects impact economic development by offering educational and enjoyable collaborative creative opportunities, providing them as a collective purpose of community engagement. Her largest piece to date is the 2020 Women’s Centennial Sculpture, located on Rockford’s Sculpture Walk. Over 125 people in Rockford’s community—children, adults, and seniors—worked the project, learning about mosaic and the women’s suffrage movement while cutting tiles, filing edges, and strategically placing the pieces.

1:45-2:00 PM  Networking Break

2:00-3:30 PM  Session V Workshops:

1)  Winning the Talent War: Keys to Attract and Retain in Today’s Tough Market
Michelle Arentz, Owner, Lazarus Learning LLC

Join Zoom Meeting: ID #89099276790

The "Great Resignation" has turned the tables on many business leaders when it comes to attracting and retaining talent. When even large, well-established organizations are struggling, it can be extra challenging for small businesses to compete. Knowing key trends and indicators in the market can make the difference between finding, hiring and keeping great employees, or making costly mistakes and losing out. This session explores what current research tells us workers are really looking for and how small business leaders can stand out from the competition by incorporating these elements into their strategies, operations and company cultures.

Michelle works in waste management, though not the kind you may first think of. Her passion is helping clients cut the waste and worry that comes from having managers who are rarely set up for success in their role - which impacts every level of an organization. She combines engaging learning experiences and data-driven tools that take the guesswork out of teambuilding, hiring and
development so these keystone players gain Management Mastery. Deeply rooted in curiosity, creativity and integrity, she brings high energy and enthusiasm to her mission of Building Better Businesses Through Better Bosses. With degrees in Communications Studies and Education, her career spans 20+ years with a wide range of audiences, from high school students to manufacturing plant workers to corporate leaders in the US and abroad, and she has a strong background in bringing learning to life.

2) **How SBDC’s and Chambers Work Together To Help Small Businesses**
   Jo Ann Di Maggio May, Director, Illinois SBDC for the Metro East at SIUE

   Join Zoom Meeting: ID #83431578970

   This session will talk about the relationship between Chambers and SBDCs. Chambers can host SBDCs but that is not the only way they can work together to benefit local businesses.

   **Jo Ann Di Maggio May** is a Glen Carbon resident and earned a bachelor’s in business administration from SIUE in 2005, followed by an MBA in 2007. Jo Ann has a Small Business background in the Restaurant industry. Her brother owns Di Maggio’s Pizza Sip. Spin. Win in Highland after their parents retired. Jo Ann was a graduate assistant for the Small Business Development Center at SIUE from August 2005—September 2007. She also has served as an international business consultant for the SBDC’s International Trade Center (ITC). Di Maggio May’s other work experience includes being an assistant manager at Walgreen’s in Edwardsville, a personal banker for US Bank in Belleville and a mortgage default counselor for US Bank in St. Louis. May came back to the SBDC as the Small Business Specialist in 2013 and then became SBDC Director in August 2017. She sat on the City of Edwardsville Advisory Board, served as Secretary for the Latino Round Table and is currently a member of the Monroe County Economic Development Corporation.

3) **Building an International Sales Network**
   Ernie Watts, President, Trinity Resource Consulting and Zach Selch, CEO, Global Sales Mentor

   Join Zoom Meeting: ID #86048292366

   Discussion of the key steps and considerations for building an effective international sales network including:
   
   • International Assessment Process
   • International Market Entry
   • Partner Search and Selection
   • Partner Evaluation Process

   As President of Trinity Resource Consulting, **Ernie** works with clients to identify areas of performance improvement and opportunities for new business to maximize the clients’ growth in world markets. Ernie has worked in corporate environments including Fortune 50, publicly traded companies as well as small, privately owned domestic businesses. Internationally, Ernie has worked and sold extensively in every major world market with significant experience in emerging markets. In each case he has demonstrated a unique ability to focus on critical success factors and make the necessary connections between strategy and tactics to exceed profitability targets.
Zach Selch spent 20 years heading Global Sales for several start ups and one $500 million dollar company after spending a decade as a Regional Sales Manager is various parts of the world, for a total of 25 years as an expatriate. Zach has sold to more than 135 countries, over $1 billion in sales total and has recruited and onboarded over 1000 channel partners. In 2021 Zach started working full time as a fractional and interim head of Global Sales and Sales Coach for VPs of Global Sales, to indulge his passion for building new sales organizations, through his company Global Sales Mentor. Zach also runs a podcast and a vlog on Global Sales and has lectured on the subject at MIT and LBS and has written extensively for Forbes as well as publishing an Amazon Best Seller on Global Sales.

4) Getting Up to Speed on State Procurement
Dave Littrell, Alex Wilson, Andrew Shackelford and Kassandra Wilkin
Chief Procurement Office for General Services

Join Zoom Meeting: ID #85657584913

We understand. State procurement is complex. And just when you get your arms around it, it changes. This session will get you up to speed on recent changes covering topics on Diversity Equity and Inclusion in procurement, contract opportunities through the Unified Procurement Program, outreach efforts of the Small Business Set-Aside Program, and a legislative update. The majority of the session will be dedicated to the e-procurement system BidBuy. BidBuy is the procurement foundation for 65 State agencies, boards, and commissions. Dave Littrell will guide participants through the vendor’s experience from registration, through searching for contract opportunities, to submitting offers.

Dave Littrell, CPPB, is the Procurement Training Manager and a State Purchasing Officer with the Chief Procurement Office for General Services. He is a Certified Professional Public Buyer by the Universal Public Procurement Certification Council (UPPCC). Dave leads the planning and delivery of training for the CPO for General Services. With thousands of staff in more than 65 state agencies involved in procurement, he understands their unique needs and consistently delivers content that they will immediately use. Dave provides training to all stakeholders in procurement – from agency end users to state purchasing officers to potential contractors. Understanding how to navigate and use the e-procurement system BidBuy to submit offers is critical to successfully bidding on State contracts. As the State’s expert on BidBuy, Dave’s time is in high demand as he develops curriculum and training material, presents live training, and designs innovative solutions to make BidBuy and State contracting more accessible. Dave’s procurement curriculum is adapted for the procurement newcomer to the seasoned professional. Some of the material and educational sessions are awarded continuing education credit hours by the UPPCC. Dave received his Bachelor of Arts degree from the University of Illinois Champaign-Urbana. He is an award-winning musician with a music career spanning more than 25 years.

Alexandria M. Wilson, JD, CPPB, is the Procurement Diversity, Equity, and Inclusion Manager and a State Purchasing Officer for the Chief Procurement Office for General Services. In these roles, Alexandria regulates agency procurements, facilitates best practices in diversity, equity, and inclusion procurement issues, develops metrics to aid and support strategic vision and planning, designs portfolio policies that reinforce supplier diversity in procurement, engages in contract negotiations, and promotes diverse vendor relationships. Alexandria is a graduate of Tuskegee University, where she earned her Bachelor of Science in Political Science before earning her Juris Doctorate from the
Andrew Shackelford, CPPB, is the Small Business Specialist and a State Purchasing Officer for the Chief Procurement Office for General Services. In his oversight of the daily operations of the Small Business Set-Aside Program, Andrew blends his experience in business and public policy with his passion for assisting Illinois’ small business owners win more State contracts by not competing with out-of-state or large companies. Andrew is a graduate of Benedictine University and is completing an executive master’s in public administration from Syracuse University’s Maxwell School of Citizenship and Public Affairs.

Kassandra Wilkin, MBA, CPPO, CPPB, NIGP-CPP, is the administrator of the Chief Procurement Office for General Service’s joint and cooperative purchasing program and a Senior State Purchasing Officer. Having led the City of Springfield’s purchasing department, Kassandra understands how joint and cooperative purchasing benefits not only State agencies, but also cities, counties, and municipalities. As the State increasingly uses more cooperative-led contracts, vendors need to know to bid on these contract opportunities. Kassandra received her bachelor’s degrees in Management and Business Administration a Master of Business Administration from the University of Illinois Springfield. She also earned a graduate certificate in Human Resource Management.

3:30-3:45 PM  Networking Break

3:45-5:15 PM  Session VI Workshop:

1) Getting the Most out of Neoserra

Jenny Malloy, Data Integrity Manager, Illinois Small Business Development Center and Ericka White, Assistant State Director, Illinois Small Business Development Center

 Join Zoom Meeting: ID #87324227135

By now, you know that the Illinois SBDC Network authorized CRM, Neoserra, is the system that holds all of your work activity history but did you know it can do more? This presentation will provide an overview of how the system functions, teach you how to create filters to hone in on specific activity, generating reports, reviewing center information prior to monthly closing and more.

Jenny Malloy has worked in business for 19 years. Currently, Jenny is working in the Illinois SBDC Network State Office as the Data Integrity Manager. With a background in customer service, project management, and data analysis, she places emphasis on accurate data as well as the customer experience. Her passion for helping others is what drives her work ethic.

Ericka White is the Assistant State Director for the Illinois SBDC Network hosted by the Illinois Department of Commerce and Economic Opportunity. At DCEO since 2000, Ericka has held various positions within the agency in fiscal operations, legislative grants and most recently served as the program manager for three statewide tax credit programs and managed the First Stop Business Information Center, a single statewide resource for entrepreneurs and businesses to obtain
comprehensive regulatory and permitting information. In her current role, Ericka oversees the day-to-day operations of 39 center locations throughout the state. Born and raised in Springfield, Ericka is a three-time graduate of the University of Illinois earning both a B.S. and Master in Business Administration as well as a Masters in Legal Studies. She actively volunteers for several local organizations and has held previous positions on local task forces focused on community engagement and economic development.

2) **Advising Artists and Creatives**
   Amy Lambert, Executive Director, Illinois SBDC at the Starved Rock Country Alliance

   **Join Zoom Meeting: ID #84330817557**

   Session focuses on building great business outcomes for artists, designers, and creative entrepreneurs as well as best practices and approaches in working with them as clients. We will visit some active strategies creatives can use in pursuing funding and higher revenues, approaches on valuing work, and the top five conversations to have with your creative clients. We will end with the secrets to success in the creative world.

   **Amy Lambert** is a leader in visioning emerging businesses. Her passion for nurturing creative talent, applying innovative technologies, and motivating local investment have shifted the landscape of Central Illinois and built a foundation for new regional economies. Amy holds a MSc in Business Design and Innovation from Carthage College, a BS in Business with emphasis on Organizational Innovation from University of Phoenix, and an AAS from Illinois Central College where her focus was Design.

3) **ITC-OTI Roundtable**
   Moderator, Jim Foley

   **Join Zoom Meeting: ID #81601294372**

   Back by popular demand...the ITC roundtable is a great opportunity to sit down together and discuss issues that are important to our network, best practices, and developments at our respective centers. We will also learn about all the Oti updates, including the latest changes in the ISTEP application.

4) **Demystifying the Public Contractor Eligibility Process**
   Ebonie S. Davis, Public Contracts Unit Administrator, Illinois Department of Human Rights

   **Join Zoom Meeting: ID #82579775932**

   Understanding the process of becoming a Public Contractor with the State of Illinois can appear overwhelming. Today we will navigate the steps to becoming a Public Contractor from determining eligibility to obtaining your business or company's Illinois Department of Human Rights ("IDHR") Number.

   **Ebonie Davis** is the Public Contracts Unit Administrator for the State of Illinois Department of Human
Rights, where she enforces the provisions of the Illinois Human Rights Act and the Department’s Administrative Rules that apply to more than 10,000 public contractors and eligible bidders who conduct business or want to conduct business with the State of Illinois by registering potential state bidders; maintaining eligibility status records; and conducting compliance reviews of public contractors and eligible bidders to determine adherence to pertinent provisions of the Act and the Rules. She also, provides technical assistance regarding equal employment opportunity and affirmative action provided to public contractors, eligible bidders, contracting agencies, and units of the Department. As Administrator, Ebonie maintains oversight of the EEO/AA monitoring programs for public contractors and eligible bidders operated by other units of state government under the authority of the Act and the Rules. Prior to promoting to Administrator, Ebonie served the Department as a certified Professional Instructor/Facilitator with the Department's Institute for Training and Development, leading various Equal Employment Opportunity, non-discrimination and life-skills trainings for executives, management, and front-line employees for both private and public-sector agencies throughout the state of Illinois. Ebonie has served in the public sector for more than a decade. Much of her tenure has been with IDHR where she also served as a Human Rights Investigator conducting neutral and fair investigations in accordance with the Illinois Human Rights Act to protect the rights of residents of Illinois from discrimination in the workplace, higher education and places of public accommodation. Ebonie has participated as a guest speaker, for IDHR; the City of Chicago Business Affairs and Consumer Protection; the Illinois Association of Minorities in Government (IAMG) conferences; the Chicago Urban League; Teach For America; the University of Illinois Chicago; the University of Chicago, and the National Diversity Council's Illinois Women's and Leadership Conferences; to name a few. Ebonie believes that through outreach and education, employers will be equipped with the necessary information to become an eligible bidder and eventually a public contractor with the State of Illinois.

Friday, May 20, 2022

8:00-9:00 AM  Check-in / Networking
Join Zoom Meeting: ID #84356702102
Password: RzZNQ3l0ZWRXYThGUVCcXRQUzJjdz09

9:00-10:00 AM  GENERAL SESSION III: GrowthWheel
David Madié, CEO and Founder
GrowthWheel International

See the latest updates to the platform with the past years updates highlighted. Gain a sneak peek at coming updates and be inspired by colleagues on how to make the most of the GrowthWheel platform.

David Madié is the founder of GrowthWheel International Inc. and the creator and designer of GrowthWheel - a visual toolbox and cloud-based platform used by business advisors to help client companies make decisions and take action. As the creator of GrowthWheel, since 2008 David has trained and
certified 4,000 business advisors, incubator managers, and entrepreneurship educators in 43 US states and 66 countries around the world. David is a frequent guest speaker at industry conferences doing talks about economic development, incubation and best business advisory practices.

10:00-10:15 PM  Networking Break

10:15-10:30 AM  GENERAL SESSION IV: IESBGA Program Excellence Award, Cert & ReCert
Ericka White, Assistant State Director, Illinois SBDC Network, Illinois Department of Commerce & Economic Opportunity

• Roger Lumen
• Shining Star
• State Star

10:30-11:00 AM  GENERAL SESSION V: Cross-Selling Network Resources
Andy Pham, Illinois SBDC at the Joseph Business Center
Chris Hollingsworth, Illinois PTAC at the Joseph Business Center
Jean Lin, Illinois SBDC ITC at College of DuPage
Moderator: Ericka White, Assistant State Director, Illinois SBDC Network

Andy Pham is the Director of the Illinois Small Business Development Center at the Joseph Center®. Since joining the SBDC in 2018, Andy has been a valuable asset to the team and at the start of 2022, he was promoted to Director. With nearly ten years of leadership experience, he regularly conducts business and entrepreneurship workshops such as Start Your Business in Illinois, Developing Your Brand Using Digital Fabrication, and Hiring Your First Employee. Mr. Pham specializes in advising both emerging and established entrepreneurs in all areas of business, from marketing and financials to the protection of intellectual property. Simultaneously, he is a volunteer advisor and evaluator at JBS. Previously, he served as the Medical Educational Program Coordinator before becoming an academic advisor at the University of Illinois, College of Medicine. Andy Pham holds a bachelor’s of science in biology from the University of Illinois at Chicago and is a 2014 graduate of the JBS nine-month entrepreneurial program. He is also a GrowthWheel Certified Advisor and Certified Business Development Advisor (CBDA).

Chris Hollingsworth is the Director of the Illinois Procurement Technical Assistance Center (PTAC) at the Joseph Center®. Chris joined the team with over six year’s experience as a PTAC Director. Previously he was responsible for overseeing NORBIC’s Procurement Technical Assistance Center. NORBIC was a regional economic development organization that promoted job growth through professional and technical services to small businesses with a particular focus on manufacturing. The organization worked to revitalize Northeast Illinois’ manufacturing base and retain and create new jobs through a partnership with the Alliance for Industry and Manufacturing. In this role, Chris assisted Northern Illinois companies with improving their current government procurement initiatives; including, solicitation/RFP analysis, proposal creation assistance, market research, contract administration assistance, and customized computerized bid matching service. He has an extensive background in sales and marketing in the consumer product goods and foodservice equipment sectors of business,
where he initiated his government sales experience and was vital to incremental revenue growth for those organizations. He gained knowledge of developing and implementing government marketing strategies within these market segments through initiating and negotiating General Service Administration (GSA) contracts and pricing with a variety of government agencies. Additionally, Chris served as a Medical Corpsman in the US Navy and holds a BS in Business Administration from Indiana University-Bloomington.

Jean first started at the Center in September of 2017 as the Illinois SBDC International Trade Center (ITC) Program Manager. She has been involved in exporting since her early 20s' with business experience in multiple markets. Her background includes export strategic planning, market development, product development and global supply chain management. She is a Certified Global Business Professional (CGBP) by the National Association of Small Business International Trade Educators (NASBITE International).

11:00-11:30 AM  GENERAL SESSION VI: Agency Updates
Ericka White, Assistant State Director, Illinois SBDC Network, Illinois Department of Commerce & Economic Opportunity and
Kristi Dula, Deputy Director, Office of Entrepreneurship, Innovation and Technology / Acting State Director, Illinois SBDC Network

Ericka White is the Assistant State Director for the Illinois SBDC Network hosted by the Illinois Department of Commerce and Economic Opportunity. At DCEO since 2000, Ericka has held various positions within the agency in fiscal operations, legislative grants and most recently served as the program manager for three statewide tax credit programs and managed the First Stop Business Information Center, a single statewide resource for entrepreneurs and businesses to obtain comprehensive regulatory and permitting information. In her current role, Ericka oversees the day-to-day operations of 39 center locations throughout the state. Born and raised in Springfield, Ericka is a three-time graduate of the University of Illinois earning both a B.S. and Master in Business Administration as well as a Masters in Legal Studies. She actively volunteers for several local organizations and has held previous positions on local task forces focused on community engagement and economic development.

Kristi Dula leads the Office of Entrepreneurship, Innovation and Technology at DCEO and additionally is the Acting State Director for the Illinois SBDC Network. This bureau is responsible for supporting entrepreneurs, innovators, and small businesses by providing information and resources necessary to launch and expand in Illinois. Prior to her role at DCEO, Dula led network relations at Pritzker Group Venture Capital where she facilitated relationships for the firm's family of companies and connected them with the firm's wide network of experts, strategic partners and potential customers. Dula previously served as a strategic executive focused on the tech sector for Kapow, an online marketplace and corporate event provider, where she developed sales and solution processes to manage the company's top ten tech accounts, including Adobe, Apple and Google. Prior to Kapow, Dula was vice president of events and content creation for 1871, the Chicagoland Entrepreneurial Center's flagship technology incubator.